



## Josh M. Owen, REBC®

Regional Vice President - Nonqualified Plans

Mid-Atlantic region - serving DE, MD, NY, NJ, PA, VA, WV, and DC

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### Who I am and how I can help you

In my role as a regional vice president-nonqualified plans, I support financial professionals and employers in the sale and service of nonqualified deferred compensation plans to organizations of all types and sizes. The deferred comp benefits we provide to clients help them recruit, reward, retain, and retire key employees. And research shows that both employers and key employees value this benefit for a variety of reasons.<sup>1</sup>

I can help with plan design, financial analysis, implementation, and delivery of deferred comp solutions. I'll work to simplify complex ideas and, with the financial professional, help put in place a solution to meet the employer's needs. My senior consultant, Jaye Nauman, senior internal wholesaler, Leigh McClure, and I provide support to financial professionals and their clients in the Mid-Atlantic region.

I've been in the financial services industry since 2003 and worked with corporate retirement plan development since 2005. I'm a native of the Carolinas and graduated with a Bachelor's degree in Financial Management from Clemson University in South Carolina. In addition to having insurance licenses, I attained the Registered Employee Benefits Consultant® (REBC) designation through the American College and hold Series 6 and 63 securities registrations from the Financial Industry Regulatory Authority (FINRA). I live in West Chester, PA, with my wife and three children.

### More about the company I work for

Principal is a leader in global investment management and retirement services with decades of experience and the No. 1 provider of nonqualified deferred comp plans<sup>2</sup>. We help people and organizations around the world build, protect, and advance their financial well-being through retirement, insurance, and asset management solutions that fit their lives. Our employees are passionate about helping clients of all income and portfolio sizes achieve their goals—offering innovative ideas, investment experience, and real-life solutions to help make financial progress possible. To find out more, visit us at [principal.com](http://principal.com).

<sup>1</sup> 2023 Principal® Trends in Nonqualified Deferred Compensation report.

<sup>2</sup> Based on number of NQDC plans (excluding 457 plans), *PLANSPONSOR* Defined Contribution Recordkeeping Survey, July 2023.

REBC® is an education designation only, obtained by the holder by completing the requisite coursework. This designation does not mean the holder is acting in a fiduciary capacity.

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